

**FFY 2015
FFY 2016**

Request for Application: CalFresh Outreach Plan



TABLE OF CONTENTS

A.	BACKGROUND, PURPOSE AND GOALS	2
B.	TIME SCHEDULE	4
C.	CONTRACT TERM	4
D.	FUNDING	4
E.	FEDERAL REQUIREMENTS	5
F.	WHO MAY SUBMIT APPLICATIONS	5
G.	APPLICANT QUALIFICATIONS	6
H.	PERSONNEL REQUIREMENTS	7
I.	FISCAL EXPERIENCE	8
J.	APPLICATIONS WITH SUBCONTRACTING AGENCIES	8
K.	SCOPE OF WORK – FOR APPLICANTS	9
L.	BUDGET DETAIL AND SUMMARY	11
M.	APPLICATION FORMAT AND CONTENT REQUIREMENTS	21
N.	APPLICATION SUBMISSION	23
O.	APPLICANT ASSURANCES	24
P.	APPLICANT QUESTIONS	25
Q.	EVALUATION AND SELECTION	27
R.	GENERAL RFA INFORMATION	30
S.	SMALL BUSINESS AND NON-SMALL ENTERPRISE PREFERENCE PROGRAM	33
T.	DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PARTICIPATION PROGRAM REQUIREMENTS	33
U.	DARFUR CONTRACTING ACT	34
V.	TAX DELINQUENCIES CONTRACT BAN	34
W.	IRAN CONTRACTING ACT	34
X.	LOSS LEADER	34
Y.	CONTRACT TERMS AND CONDITIONS	34
Z.	DEFINITIONS	36
AA.	ATTACHMENTS AND EXHIBITS	37

REQUEST FOR APPLICATION

A. BACKGROUND, PURPOSE AND GOALS

1. Background

The mission of the California Department of Social Services (CDSS) is to serve, aid and protect needy and vulnerable children and adults in ways that strengthen and preserve families, encourage personal responsibility and foster independence. One of the ways this mission is accomplished is by providing information and application assistance to Californians who may be eligible for CalFresh (California's name for the Supplemental Nutrition Assistance Program), but are not participating, so that they may have access to healthy food using CalFresh benefits. The CalFresh Outreach (CFO) Plan is a very specific example of how CDSS works to reach the goal of increasing participation in and access to CalFresh.

Although CalFresh is a critical component of the safety net for needy families and individuals, not all that are potentially eligible apply for the program. As a result, California has one of the lowest program participation rates in the country. Common barriers to CalFresh participation include lack of knowledge regarding eligibility, frustration with the application process, and stigma and misconceptions in immigrant communities. This may be especially true among potentially eligible working low-income households or seniors that perceive less need or reason to enroll.

In 2003, CDSS partnered with California Department of Public Health (CDPH) to identify and implement various methods of Food Stamp Program (now known as CalFresh) outreach. This resulted in the development of a two-year demonstration project with six nonprofit agencies to promote participation and access. What was so unique about the project was that it combined, for the first time in California, the use of State Share (in-kind) funding from local nonprofit agencies to access federal financial participation funding from the United States Department of Agriculture—Food and Nutrition Service (USDA-FNS).

Today, CDSS provides the operational management and direct programmatic responsibility for the California CalFresh Outreach Plan. In Federal Fiscal Year (FFY) 2014, CDSS will continue efforts through the CFO Plan to increase participation in California by at least 59,000 households and will provide services in 51 of California's 58 counties by 7 contractors and their 101 subcontracting agencies. The total CFO Plan budget for current year is \$28.4 million for FFY 2014, consisting of \$15.1 million in State Share costs and \$13.3 million in total Federal Share costs (funding from USDA-FNS).

2. Purpose

The purpose of this Request for Application (RFA) is to solicit contract agencies to participate in the CFO Plan. The objective of the CFO Plan is to increase California's CalFresh participation rate by assisting potentially eligible Californians to apply for CalFresh and to maintain their benefits as long as they are eligible. Successful awareness efforts help correct myths and misconceptions about CalFresh and enable

potentially eligible people to make an informed decision to participate. The CFO Plan focuses its activities on targeted population groups, including working low-income households, Latinos, seniors, mixed immigration status households, veterans and military families.

3. Goals

- a. Increase participation in CalFresh by increasing the number of approved applications submitted to County Welfare Departments (CWD) statewide.
- b. Increase retention in CalFresh by assisting clients to submit timely semi-annual reports (SAR 7).
- c. Increase retention in CalFresh by assisting clients to submit Recertification Applications.
- d. Create strong partnerships with local CWDs that facilitate information and data sharing about approved and denied applications.
- e. Provide CFO assistance in each county of the state.
- f. Educate people potentially eligible for the program about CalFresh, and address barriers to program participation including:
 - 1) Lack of knowledge of who is eligible for the program, especially among working low-income households.
 - 2) Frustration with the application process, especially with the amount and type of information required by the household to apply for CalFresh.
 - 3) Misconceptions in immigrant communities including:
 - Fear that applying for the program will affect their application for legal residency.
 - Fear of losing future earnings by having to pay back the benefits they have received through the program.
 - 4) Perceptions among seniors that they are taking benefits away from others or that they have less need or reason to enroll.
- g. Build and enhance horizontal integration efforts with programs such as Women, Infants and Children (WIC), Medi-Cal, Area Agencies on Aging (AAA) and Covered California (California's Affordable Care Act health exchange).

B. TIME SCHEDULE

Below is the tentative time schedule for this procurement:

EVENT	DATE	
RFA Available to Prospective Applicants	April 25, 2014	
Written Questions Submission Deadline	May 2, 2014	4:00 p.m.
Voluntary Pre-Applicant Teleconference	May 8, 2014	1:30pm
Teleconference Summary Posted	May 12, 2014	
Final Date for Application Submission	May 30, 2014	4:00 p.m.
Notice of Intent to Award Posted	June 6, 2014	
Last Day to Protest Award	June 13, 2014	4:00 p.m.
Final Awards Posted	June 18, 2014	
Contract Start Date	October 1, 2014	

C. CONTRACT TERM

The anticipated term of the Agreement is for two years beginning on October 1, 2014 or the date of Department of General Services' (DGS) approval, whichever is later and ending on September 30, 2016. The Agreement will be of no force or effect until it is signed by both parties and approved by DGS. The CFO Plan must also receive approval from USDA-FNS. The Contractor is hereby advised not to commence performance until all approvals have been obtained. Should performance commence before all approvals are obtained, said services may be considered to have been volunteered.

D. FUNDING

The USDA-FNS Guidance allows total costs for CalFresh Outreach activities to be reimbursed 50 percent. CDSS breaks total program costs of contracting agencies into State Share and Federal Share expenses (see Definitions, Section Z). CDSS will reimburse contract agencies up to a total of 70 percent of the State Share expenditures contributed by the agency. The remaining monies will be used by CDSS to support, coordinate and conduct statewide CFO Plan activities.

Funding for each federal fiscal year is subject to approval of the annual state plan by USDA-FNS. If full funding does not become available, CDSS will amend, reduce or cancel the resulting agreement. Continuation of services beyond the fiscal year is subject to the contractor's continued successful performance. Applicants must apply for a two-year term with each year contingent upon satisfactory performance and the continued availability of federal matching funds.

E. FEDERAL REQUIREMENTS

The CFO Plan is governed by the following guidelines and regulations. Please take time to read through each of these documents that pertain to your organization before you submit an application.

1. USDA Guidance

- [Supplemental Nutrition Assistance Program](#) (SNAP)

2. Office of Management and Budget (OMB) Circulars

- [OMB A-21 - Cost Principles for Educational Institutions](#)
- [OMB A-87 - Cost Principles for State, Local, and Indian Tribal Governments](#)
- [OMB A-110 - Uniform Administrative Requirements for Grants and Agreements With Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations](#)
- [OMB A-122 - Cost Principles for Non-Profit Organizations](#)

3. Code of Federal Regulations:

- [Title 7, Part 277 - Payments of Certain Administrative Costs of State Agencies](#)
- [Title 7, Part 3016—Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments](#)
- [Title 7, Part 272 - Requirements for Participating State Agencies](#)

Additionally, public service announcements through billboard, radio or television advertising are not allowed for CFO contracts under the recently approved Farm Bill (Agricultural Act of 2014, Section 4018(a) <http://www.gpo.gov/fdsys/pkg/BILLS-113hr2642enr/pdf/BILLS-113hr2642enr.pdf>).

F. WHO MAY SUBMIT APPLICATIONS

This RFA is open to all non-profit organizations, state or public universities, and other governmental entities located in California that meet the requirements of the program. Counties or organizations that are receiving USDA-SNAP administrative funding for CalFresh outreach activities outside of the CalFresh Outreach Plan are not eligible to apply.

Before submitting an Application, please review the entire RFA to ensure that your organization understands the requirements for the RFA and the requirements of the program. Review the RFA Submission Checklist, Attachment 1, to ensure that you can provide all required documentation and information. In addition, review the sample contract terms, conditions and contract exhibits and be willing to comply with the contract terms, conditions and contract exhibits should a contract be awarded.

Note: The RFA and required documents for this RFA are available on the CalFresh Outreach website at: <http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm>.

G. APPLICANT QUALIFICATIONS

Please provide the following narrative:

1. Describe the applicant's capability to participate in outreach activities for CalFresh:

- a. Complete the Application Cover Page, Attachment 2, to provide general information about your organization.
- b. Provide a written narrative, which includes the information necessary to assess your organization's capability in the areas below. Ensure that you submit the necessary documents with your narrative, per the RFA Submission Checklist, Attachment 1.

2. Agency Background and Previous Experience:

- a. Provide a brief description of the applying agency, including:
 - 1) Date of establishment and type of ownership. If applicable, explain any changes in business history (i.e., name change, ownership, partnership arrangements, etc.) or organizational structure that will assist CDSS in determining the qualifications of the applying firm.
 - 2) A description of the applying agency's goals that are relevant, closely related, or will complement this project.
 - 3) Location of agency headquarters and any outlying offices.
 - 4) Current organization chart of applicant's entire agency.
 - 5) If claiming non-profit status, non-profit organizations must certify their eligibility by providing a copy of their 501(c)3 document. Submit a copy of an IRS determination letter indicating nonprofit or 501(c)3 tax exempt status. Submit a written explanation if this documentation cannot be submitted and reason(s) for non-submittal.

3. Describe experience that qualifies the applying agency to undertake this project.

At a minimum, demonstrate that the applying agency possesses at least three (3) consecutive years of experience within the last five (5) years of services similar in nature or closely related to the Scope of Work (SOW) in this RFA.

4. Priority will be given to Applicants that have experience working with CalFresh eligible clients and have familiarity with the CalFresh program. Your narrative must include information about your experience:

- a. Working with low-income clients in community-based settings, including the number of low-income persons served.

- b. Educating people potentially eligible for the program about CalFresh and addressing barriers to program participation, especially with the following target populations:
 - Seniors
 - Working low-income households
 - Immigrants
 - Latinos
 - Mixed-status households
 - Veterans and military families
- c. Managing subcontractors (if subcontractors are to be utilized).
- d. Implementing programs.
- e. Establishing and maintaining effective working relationships with government entities, local community-based organizations (CBOs), and private nonprofit organizations including but not limited to: Local Health Departments, AAAs, WIC, First 5, Project Lean, UC Cooperative Extension, and schools.
- f. Developing strong relationships with County Welfare Departments (CWD).
- g. Providing access through application submissions (new applications, semi-annual reporting (SAR 7) and recertifications) for the CalFresh program and/or similar benefits programs such as Medi-Cal.

5. Your Application also needs to include:

- a. A list of the county(ies) in which you will be conducting outreach activities:
 - Include the percent of total efforts that will be spent in each county.
 - Include target populations you intend to serve in each county.
- b. Letters of support from at least three (3) organizations that the Applicant has partnered with in the past five (5) years that can confirm their satisfaction with the Applicant's services and confirm whether the Applicant provided timely and effective services or deliverables.
- c. Disclosure of Lobbying Activities, Attachment 4, if your agency or a subcontracting agency has a Federal Share budget that will equal or exceed \$100,000.

H. PERSONNEL REQUIREMENTS

- 1. Provide information and qualifications regarding all key personnel in your organization that will be necessary to achieve the SOW of CFO by providing administration and assistance with application submissions.
- 2. Indicate what tasks each key CFO staff person shall perform and whether these tasks are administrative activities and/or direct services. Discuss how the number of key personnel and their proposed duties and time commitments are appropriate to achieve

the proposed services and activities. This description should not exceed more than one page for each key staff person.

3. In Attachments 6b and 6d, and (if Subcontractors are included) Attachment 7b and 7d list the number of employees who will be engaged in this Agreement (i.e., number of employees involved in CFO related services), including their time percentage involvement.

I. FISCAL EXPERIENCE

Describe how the applying agency will manage accounting, invoicing and general fiscal management practices to be in compliance with CDSS requirements. Provide detail about:

1. The financial stability of the organization, especially the ability to have adequate cash reserves to meet all financial obligations while awaiting reimbursement from the State.
2. How the applying agency will ensure program/fiscal integrity of all and program awareness and access activities.
3. How the subcontractors will be monitored for general CDSS fiscal compliance (If applicable).

J. APPLICATIONS WITH SUBCONTRACTING AGENCIES

1. Your agency may utilize subcontracting agencies for conducting CFO activities. **If you choose to utilize subcontracting agencies, the subcontracting agencies (hereafter referred to as prime subcontractors) may also have subcontracts. However, any second-level subcontractors cannot have any subcontractors of their own.**

For example, applying Agency A may have a prime subcontractor, Agency B. Agency B may have a subcontractor of its own, Agency C. However, Agency C may not have any of its own subcontractors for conducting CFO activities.

2. If you intend to utilize subcontracting agencies, the applying agency is responsible for all fiscal and programmatic training (as pre-approved by CDSS) and periodic site reviews of their subcontractors. The frequency and number of site reviews will be mutually agreed upon by the applying agency and CDSS.
3. Please submit your template for a Memorandum of Understanding (MOU) that you will use with each subcontracting agency. (If you don't have a template, you can use the template provided in Exhibit H.)
4. Your agency shall be responsible for establishing and maintaining contractual agreements with, and reimbursing subcontractor's work performed in accordance with the terms of the Agreement.

For each subcontracting agency in the application include a description with the following information:

- a. Full legal name of organization (must match information provided on SOW and Budget Detail).
- b. Full legal address of organization.
- c. Organization website address, if any.
- d. A paragraph that provides a brief description of the agency.
- e. A narrative that describes the capability of this subcontractor to participate successfully in the CFO Plan. The narrative should provide the following information and **must not exceed more than one page for each subcontractor**:
 - Identify the qualifications and duties or role of each subcontractor.
 - Discuss the necessity of using each subcontractor.
 - Explain what contributions their services and expertise will add to this program.

K. SCOPE OF WORK – FOR APPLICANTS

(Applications that do not use the Scope of Work Attachment will not be considered.) The required Attachment can be found on our website at: <http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm>.

1. SOW Item Detail:

- a. **Item 1:** CalFresh Applications Submitted (on behalf of clients)

This deliverable is defined as CalFresh applications (both paper applications and on-line applications) submitted by your agency and/or subcontractors on behalf of a client and funded by the CFO plan. Contractors must work with their county to determine the application submittal process that works best for the county.

- b. **Item 2:** CalFresh Applications Approved

This deliverable is defined as CalFresh applications submitted by your agency and/or subcontractors on behalf of a client and subsequently approved by the county welfare department for benefits. Contractors must work with their county to determine the process that works best for the county to supply application approval data to your agency.

- c. **Item 3:** Semi-Annual Report (SAR 7) Forms Submitted

This deliverable is defined as SAR 7 forms submitted by your agency and/or subcontractors on behalf of a client. Contractors must work with their county to determine the SAR 7 application submittal process that works best for the county.

d. **Item 4:** CalFresh Recertification Applications Submitted

This deliverable is defined as CalFresh Recertification Applications submitted by your agency and/or subcontractors on behalf of a client. Contractors must work with their county to determine the Recertification Application submittal process that works best for the county.

e. **Item 5:** Partnering and General CFO Activities

This deliverable is defined as partnering with counties and CBOs to address barriers to participation and meet the overall goals of the CFO Plan. These agencies may include, but are not limited to: AAA, WIC, First 5, Project Lean, UC Cooperative Extensions, Local Health Departments and schools. This deliverable also includes:

- 1) Distribution of CFO approved materials (posters, brochures, web sites and direct mail) to inform low-income, potentially eligible households about CalFresh eligibility. No funds from this contract shall be used for public service announcements on radio, television or billboards.
- 2) Participating in local collaborative meetings to promote CFO.
- 3) Providing training and technical assistance to other agencies serving the targeted populations.

2. Applicant SOW for the CFO Plan will include the following:

- a. Use the SOW Attachment 8 to submit your estimates and narrative for FFY 2015 and FFY 2016. You must complete the SOW Attachment 8 for both fiscal years to cover the two-year contract term. All Applicants are required to submit estimates for each deliverable that you plan to undertake.

The SOW Attachment 8 must include details about your plan to achieve **each** SOW item selected, including how you will reach the following target populations:

- Seniors
- Working low-income households
- Immigrants
- Latinos
- Mixed-status households
- Veterans and military families

Note: Please ensure that any activities you undertake in support of completing the SOW items are in alignment with the FNS guidance:

http://www.fns.usda.gov/sites/default/files/Outreach_Plan_Guidance.pdf, Section B1, for information on allowable activities.

- b. If subcontractors are to be utilized, use the provided tabs in the worksheet to submit SOW estimates and a narrative. Subcontractor's SOW must be primarily subvention services. Subcontracting is subject to conditions as set forth in DGS' OLS California State Contracting Manual, Volume 1, Chapter 3, Section 3.17.

If your agency utilizes prime subcontractors, then:

- The prime subcontractor must complete SOW Attachment 8 for itself and its subcontractors.
 - The applying agency must ensure that any of its subcontractors that are prime subcontractors must be included in the applying agency's scope of work.
- c. SOW activities must coincide and be consistent with the Budget Detail maximum guidelines (Section L) and consistent with contract Exhibit B Invoicing and Payment.
- d. If Applicants choose to reject tasks, activities or functions, indicate '0' in the SOW Attachment 8. Do not delete them.

L. BUDGET DETAIL AND SUMMARY

1. The Budget section will consist of the following documents:

(Applications that do not use the Budget Attachments will not be considered. Required Attachments can be found on the CalFresh Outreach website at: <http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm>)

- a. Applicant Budget Summary (FFY 2015) (Attachment 6a).
- b. Applicant Annual Budget Detail (FFY 2015) (Attachment 6b).
- c. Applicant Budget Summary (FFY 2016) (Attachment 6c).
- d. Applicant Annual Budget Detail (FFY 2016) (Attachment 6d).
- e. Subcontractor(s) Budget Summary (FFY 2015) (One for each subcontractor, if subcontractors are included) (Attachment 7a).
- f. Subcontractor(s) Budget Detail (FFY 2015) (One for each subcontractor, if subcontractors are included) (Attachment 7b).
- g. Subcontractor(s) Budget Summary (FFY 2016) (One for each subcontractor, if subcontractors are included) (Attachment 7c).
- h. Subcontractor(s) Budget Detail (FFY 2016) (One for each subcontractor, if subcontractors are included) (Attachment 7d).

2. General Instructions and Guidelines:

- a. Using Budget Attachments 6a-d and (if necessary) 7a-d, list program costs using whole dollars only. Round fractional dollar amounts or cents to the nearest whole dollar amount.
- b. When completing the budget(s) include all estimated costs to perform the services for the entire budget year, including applicable annual rate adjustments attributable to merit increases, profit margins and inflation or cost of living adjustments.
- c. Budget Attachments include formulas and formatting designed to assist the applicant and subcontractor(s) in submitting accurate budgets. The formulas and formatting

may need to be adjusted, if necessary, and are not intended to restrict budget creation.

- d. The Applicant and Subcontractor Budget Attachments are different. Instructions are included separately below.

If your agency utilizes prime subcontractors, then:

- The prime subcontractor must complete applicant budgets (rename to prime subcontractor budget) for itself as well as receive and submit applicant subcontractor budgets from all its subcontractors.
- The applying agency must ensure that any prime subcontractors and also prime subcontractor's subcontractor budgets and scopes of work be included in the applying agency's RFA submission.

3. Applicant Budget Evaluation:

The Applicant's Budget will be evaluated and scored in conjunction with three key SOW deliverables—**approved** applications, **submitted** SAR 7s, and **submitted** Recertifications. The maximum guidelines below apply to the Applicant's combined budget. A combined budget includes Federal Share and State Share program costs across all line-items (personnel, fringe benefits, operating expenses, travel and per diem, equipment, other costs and indirect costs). The Applicant's Budget must demonstrate that it corresponds to the following **maximum** guidelines for the **combined budget** when compared with submitted SOW program outcomes.

- \$0 (zero dollars) per submitted application
- \$350 per approved application
- \$20 per submitted SAR 7
- \$50 per submitted Recertification

The following example shows a sample \$500,000 **combined budget** and corresponding minimum SOW outcomes necessary to substantiate the budget.

- 1,300 approved applications at \$350 accounts for \$455,000
- 1,000 submitted SAR 7s at \$20 accounts for \$20,000
- 500 submitted Recertifications at \$50 accounts for \$25,000

4. Applicant Combined Annual Budget Detail and Budget Summary Instructions:

- a. The Applicant Budget Attachments (6a-b for FFY 2015 and 6c-d for FFY 2016) contain two (2) tabs. The first tab is the "Annual Budget Detail" and the second tab is the "Budget Summary". The Applicant's State Share and Federal Share budget costs must be entered on the Annual Budget Detail tab. These numbers will automatically populate the Budget Summary tab.
- b. Two (2) separate Applicant Budgets must be submitted—one for each Federal Fiscal Year of the two year contract term. Applicants utilizing subcontractors must also

submit two (2) separate Subcontractor Budgets for each subcontractor corresponding to each Federal Fiscal Year of the contract term.

- c. List applying agency's legal name at the top of each tab.
- d. **Budgets that do not correspond to the maximum guidelines for the combined budget when compared with submitted SOW program outcomes will be reduced. Please check all calculations with a calculator prior to submitting budget documents.**

5. Applicant Line Item Instructions:

a. Personnel Costs

Describe and justify staffing information for each position budgeted. Include all of the following information:

- 1) **Percent of Salary Paid from State Share:** A percentage based upon how your agency conducts and/or manages the CFO program activities. The percentage entered will be used by embedded formulas to calculate the split between State Share and Federal Share for each position listed. If staff salaries have different proportions of State Share, spreadsheet formulas for affected staff will need to be changed.
- 2) **Organization's Total Full Time Equivalent (FTEs) for Proration:** This should be the sum of your agency's FTEs for all staff working at the CFO operations center or administrative office, including staff working on projects other than CFO.
- 3) **Name and Position Title:** Enter the employee name(s) and position title(s). If a position is not filled, indicate "TBD".
- 4) **Annual Salary:** Enter the annual salary used for each employee. When converting a monthly, semi-monthly, weekly or hourly salary to an annual salary, use the standard 52 week year at 2080 hours/year to make the calculation. Calculations must be based on actual salaries.

NOTE: Per the USDA Outreach Guidance, Section 4 Cost Policy, "The wages under the outreach plan are not necessarily the same as wages paid to the individual when they perform the duties to which they may be credentialed. Their benefits and wages must be related to the outreach task they perform."

- 5) **Full Time Equivalent (FTE):** Enter the FTE that each employee will spend on allowable CFO activities (e.g., 20 hours of a 40-hour week equals .50 FTE). **Enter this as a decimal not a percentage.** (The FTE must be carried to four decimal places). You must use a standard 52-week year at 2080 hours to make this calculation. For example, if the position is budgeted for 48 hours, the FTE would be calculated as $48/2080 = .0230$. **Total FTE for All Staff Listed** will automatically be totaled above the personnel table.

- 6) **Total Dollars:** Automatically totaled to reflect the annual CFO salary for each position. Annual salary multiplied by Total FTE must equal the Total Dollars column.
- 7) **Position Descriptions:** Include a brief description of each employee's duties and responsibilities as they relate to allowable CFO activities.

NOTE: If any staff work on a reduced time basis (part time), but dedicate 100% to CFO with no other funding source for salary and benefits, prorating is not required and salary figures will need to be adjusted manually. Part time staff dedicated less than 100% to CFO will require proration at a different percentage than would a full time staff person, and their proration percentage would need to be adjusted manually. **Please denote part time personnel with a “(PT)” next to their name and indicate their part time basis e.g. “¾ time”.**

b. Fringe Benefits

Include fringe benefit expenses including, but not limited to, costs for workers' compensation insurance; unemployment insurance, health, dental, vision and/or life insurance; disability insurance; pension plan/retirement benefits; etc.

Benefits Rate (percent of salary): Display fringe benefit costs as a percentage rate of the total personnel costs. Enter 0% if no fringe benefit costs will be incurred. State Share, Federal Share and Total Dollars cells will automatically calculate.

c. Operating Expenses

- 1) **Percent of Operation Expenses Paid from State Share:** A percentage based upon how your agency conducts and/or manages CFO activities. The percentage entered will be used by embedded formulas to calculate the split between State Share and Federal Share for each operating expense listed. Proration Percentage (as calculated in Personnel section): This field is automatically populated.
- 2) **Fixed Costs:** Identify major recurring operating expenses and provide a detailed cost breakout of these expenses. The detailed cost breakout must include the basis for the calculation. Example: “Postage -1,000 stamps at 49 cents each for CFO mailing = \$490.”
- 3) **Prorated Costs:** Non-direct expenses, operating expenses, space allocation and the like must be prorated based on the FTE dedicated to CFO which was calculated in the personnel section. Examples include, but are not limited to, items such as office supplies, communications (telephone, facsimile, email), routine printing and duplication, and space-rent/lease (include formula for calculating space costs) and any other costs which are shared by all staff, not just those working on CFO. Indicate the number of items and the cost per item for each budgeted cost.

NOTE: Non-routine and one-time expenses must be budgeted under the “Other Costs” line item.

d. Equipment Expenses

- 1) **Percent of Equipment Expenses Paid from State Share:** A percentage based upon how your agency conducts and/or manages CFO activities. The percentage entered will be used by embedded formulas to calculate the split between State Share and Federal Share for each equipment expense listed.
- 2) **Proration Percentage (as calculated in Personnel section):** This field is automatically populated.
- 3) **Fixed Costs:** Describe and itemize any equipment to be purchased needed by your organization to fulfill contract deliverables. Equipment is defined as non-expendable property used to conduct allowable CFO activities. This could include items such as computers, televisions, VCRs/DVDs, cameras, typewriters, non-modular furniture, etc.
- 4) **Prorated Costs:** If equipment will not be used exclusively for allowable CFO activities or by a 100% FTE CalFresh Outreach staff person, then the expense must be prorated to include only the portion related to CFO. If prorating, please indicate the percentage by which you are prorating the expense and the staff to whom the equipment is assigned (the % FTE for the staff must match the prorated % of the cost) or the name of the program(s) sharing the equipment and the percentage of use by the additional program(s).

NOTE: Any equipment used to handle personally identifiable information (e.g., computers, fax machines, filing cabinets) must adhere to CDSS confidentiality requirements specified in Exhibit E, Attachment 1.

e. Travel Expenses

- 1) **Percent of Travel Expenses Paid from State Share:** A percentage based upon how your agency conducts and/or manages CFO activities. The percentage entered will be used by embedded formulas to calculate the split between State Share and Federal Share for each travel expense listed.
- 2) **Description:** Clearly describe the type of travel, the event to be attended, the percent of CFO content, purpose of the travel and how many staff are included.
- 3) **Minimum Travel Requirements:** CDSS expects attendance at the following events:
 - A two-day fiscal and program training in Sacramento in October 2014 for all successful Applicants. A minimum of two staff (one fiscal and one program staff) shall attend this training.
 - The annual CalFresh Forum event by at least one representative from the applying agency.
 - One or more of the quarterly FANOut meetings in Sacramento by at least one representative from the applying agency.
 - One day each year of the program to meet with CDSS to discuss outcomes and ongoing efforts to fulfill the CFO contract.

- 4) **Estimated Cost:** Indicate the total cost for travel and per diem estimates prorated if necessary. The estimated cost must include an expense breakdown for registration, hotel, mileage, meals, parking, etc. Proration of travel is not necessary for CDSS-required training and activities. Proration is necessary for optional travel which includes both proration for a staff person's FTE dedicated to CFO and proration for the percentage of a conference dedicated to CFO.

Example: A 50% FTE project coordinator will be attending a workshop on Children's Health and CalFresh. It is determined from the program agenda that CFO-related content is 50%. Total expenses for the trip are \$400. The reimbursable amount would be \$100 (\$400 x 50% FTE x 50% program content).

The guidelines for allowable reimbursement rates are located on the CalHR website <http://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx>.

f. **Subcontract Expenses (leave blank if not applicable)**

- 1) **Subcontractor Name:** List one Subcontractor per line. A Subcontractor Budget for each Fiscal Year must be submitted in this RFA for each named subcontractor.
- 2) **State Share and Federal Share and Total Dollars:** Enter the State Share, Federal Share and Total Dollars from the corresponding Federal Fiscal Year of the Subcontractor Budget Summary page.

NOTE: Applicant is responsible for ensuring subcontractor State Share sources conform to standards set forth in the USDA Guidance.

g. **Other Costs**

- 1) **Percent of Other Costs Paid from State Share:** A percentage based upon how your agency conducts and/or manages CFO activities. The percentage entered will be used by embedded formulas to calculate the split between State Share and Federal Share for each Other Costs expense listed.
- 2) **Proration Percentage (as calculated in Personnel section):** This field is automatically populated.
- 3) **Fixed Costs:** Non-routine or one-time expenses to be used entirely for CFO efforts.
- 4) **Prorated Costs:** Non-routine or one-time expenses used partially for CFO efforts.

NOTE: Other Costs might include expenses such as single audit costs, website design, CalFresh banners and similar one-time expenses.

h. Indirect Costs

The OMB Circulars describe cost principles that apply to organizations receiving federal reimbursements. Please refer to the appropriate OMB Circular listed below, based on your agency type, for information on how to determine indirect rate calculations.

- A-22--Cost Principles for Education Institutions,
http://www.whitehouse.gov/omb/circulars_a021_2004/
- A-87--Cost Principles for State, Local and Indian Tribal Governments,
http://www.whitehouse.gov/omb/circulars_a087_2004/
- A-122--Cost Principles for Non-Profit Organizations,
http://www.whitehouse.gov/omb/circulars_a122_2004/

Regardless of the indirect cost method used, the applied indirect cost rate cannot exceed 26 percent of the total Modified Direct Costs (Total Direct Costs less subcontractors and equipment) or 25 percent of Total Personnel Costs.

Federally-Negotiated Rates

If the Applicant has a federally-negotiated indirect cost rate, that rate should be the Applicant's standard indirect cost rate and is the one to be used for calculating the indirect cost line item. Applicants using a federally-negotiated rate must submit supporting documentation of that rate with the RFA application in the form of a letter from the cognizant agency that has approved the indirect rate. A cognizant agency is a federal agency that is responsible for establishing Indirect Cost rates.

Simplified Allocation Method

If the Applicant does not have a federally negotiated rate, the Applicant agency may use the Simplified Allocation Method to determine an indirect rate for the proposed budget. Applicants choosing this option must complete and sign the Certification of Indirect Costs form (Attachment 9) which signifies the use of the simplified allocation method to determine their indirect rate. The established rate indicated on the Certification of Indirect Costs form is the one to be used for calculating the indirect cost line item. Use the indirect cost for FFY 2015 as the estimated indirect cost for FFY 2016.

- 1) **Percent Indirect Costs:** Enter the percentage calculated for Indirect Costs (not to exceed 26%).
- 2) **Check the line items on which indirect costs are to be applied:** Indicate with a check mark by clicking in the appropriate box(es).
- 3) **Calculate State Share, Federal Share and Total Dollars:** Apply Indirect Cost rate to each line item indicated and enter whole dollar amounts under State Share and Federal Share (Total Dollars will auto-fill).

i. **Total Costs**

Line Item totals will automatically be summed at the end of the spreadsheet. Ensure all Line Item costs equal these figures.

6. Subcontractor Annual Budget Detail Instructions:

- a. The Subcontractor Budget Attachments (7a-b for FFY 2015 and 7c-d for FFY 2016) contain two (2) tabs. The first tab is the “Annual Budget Detail” and the second tab is the “Budget Summary”. The Subcontractor’s costs must be entered on the Annual Budget Detail tab; these numbers will automatically populate the Budget Summary tab.
- b. As mutually agreed upon by Applicant and Subcontractor, add the **Percent of Total Program Costs to be Reimbursed** by Contractor to the bottom of the Budget Summary page.
- c. Two (2) separate Subcontractor Budgets must be submitted—one for each Federal Fiscal Year of the two year contract term.
- d. List the official name of the Subcontracting Agency and the name of the Contractor at the top of each tab where indicated.

7. Subcontractor Line Item Instructions:

a. **Personnel Costs**

Describe and justify staffing information for each position budgeted. Include all of the following information:

- 1) **Organization’s Total FTEs for Proration:** This should be the sum of your agency’s FTEs for all staff working at the CFO operations center or administrative office, including staff working on projects other than CFO.
- 2) **Name and Position Title:** Enter the employee name(s) and position title(s). If a position is not filled, indicate To Be Determined (“TBD”).
- 3) **Annual Salary:** Enter the annual salary used for each employee. When converting a monthly, semi-monthly, weekly or hourly salary to an annual salary, use the standard 52-week year at 2080 hours/year to make the calculation. Calculations must be based on actual salaries.
- 4) **FTE:** Enter the FTE that each employee will spend on allowable CFO activities (e.g., 20 hours of a 40-hour week equals .50 FTE). **Enter this as a decimal not a percentage.** (The FTE must be carried to four decimal places). You must use a standard 52-week year at 2080 hours to make this calculation. For example, if the position is budgeted for 48 hours, the FTE would be calculated as $48/2080 = .0230$. **Total FTE for All Staff Listed** will automatically be totaled above the personnel table.

- 5) **Total Dollars:** Automatically totaled to reflect the annual CFO salary for each position.
- 6) **Position Descriptions:** Include a brief description of each employee's duties and responsibilities as they relate to allowable CFO activities.

NOTE: If any staff work on a reduced time basis (part time) but dedicate 100% to the CFO program with no other funding source for salary and benefits, prorating is not required and salary figures will need to be adjusted manually. Part time staff dedicated less than 100% to CFO will require proration at different percentage than would a full time staff person and their proration percentage would need to be adjusted manually. **Please note any part time personnel with a "(PT)" next to their name and indicate their part time basis e.g. "3/4 time".**

b. Fringe Benefits

Include fringe benefit expenses including, but not limited to, costs for workers' compensation insurance, unemployment insurance, health, dental, vision and/or life insurance, disability insurance, pension plan/retirement benefits, etc.

Benefits Rate (percent of salary): Display fringe benefit costs as a percentage rate of the total personnel costs. Enter 0% if no fringe benefit costs will be incurred. The Total Dollars cell will automatically calculate.

c. Operating Expenses

- 1) **Proration Percentage (as calculated in Personnel section):** This field is automatically populated.
- 2) **Fixed Costs:** Identify major recurring operating expenses and provide a detailed cost breakout of these expenses. The detailed cost breakout must include the basis for the calculation. Example: "Postage -1,000 stamps at 49 cents each for CFO mailing = \$490."
- 3) **Prorated Costs:** Non-direct expenses, operating expenses, space allocation, and the like must be prorated based on the FTE dedicated to CFO which was calculated in the personnel section. Examples include, but are not limited to, items such as office supplies, communications (telephone, facsimile, email), routine printing and duplication, and space-rent/lease (include formula for calculating space costs) and any other costs which are shared by all staff, not just those working on CFO. Indicate the number of items and the cost per item for each budgeted cost.

NOTE: Non-routine and one-time expenses must be budgeted under the "Other Costs" line item.

d. Equipment Expenses: This line item is not allowed in subcontracts.

e. Travel Expenses

- 1) **Description:** Clearly describe the type of travel, the event to be attended or purpose of the travel and how many staff are included.
- 2) **Estimated Cost:** Indicate the total cost for travel and per diem estimates prorated if necessary. The estimated cost must include an expense breakdown for registration, hotel, mileage, meals, parking, etc. Proration on travel is not necessary for CDSS required training and activities. Proration is necessary for optional travel which includes both proration for a staff persons FTE dedicated to CFO and proration for the percentage of a conference dedicated to CFO.

Example: A 50% FTE project coordinator will be attending a workshop on Children's Health and CalFresh. It is determined from the program agenda that CFO -related content is 50%. Total expenses for the trip are \$400. The reimbursable amount would be \$100 (\$400 x 50% FTE x 50% program content).

The guidelines for allowable reimbursement rates are located on the California Department of Human Services (CalHR) website
<http://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx>.

f. Subcontracts:

This section is not applicable unless the subcontractor is also acting as a prime subcontractor. Prime subcontractors should follow applicant instructions above (Section L.5), with all subcontractors of prime subcontractors following the instructions subcontractors (Section L.7)

g. Other Costs

- 1) **Proration Percentage (as calculated in Personnel section):** This field is automatically populated.
- 2) **Fixed Costs:** Non-routine or one-time expenses to be used entirely for CFO efforts.
- 3) **Prorated Costs:** For non-routine or one-time expenses to be used partially for CFO efforts.

NOTE: Other Costs might include expenses such as single audit costs, website design, CalFresh banners, and similar one-time expenses.

h. Indirect Costs

See this section in Applicant Combined Annual Budget Detail Instructions above for details on establishing an Indirect Costs rate.

- 1) **Percent Indirect Costs:** Enter the percentage calculated for Indirect Costs (not to exceed 26%).

- 2) **Check the line items on which indirect costs are to be applied:** Indicate with a check mark by clicking in the appropriate box(es).
- 3) **Calculate Total Dollars:** Apply Indirect Cost rate to each line item indicated and enter a whole dollar amount in the Total Dollars cell.

i. **Total Costs**

Line Item totals are automatically summed at the end of the spreadsheet. Ensure all Line Item costs equal these figures.

M. APPLICATION FORMAT AND CONTENT REQUIREMENTS

The following instructions describe the **mandatory** application format for development and presentation of the Application. The instructions are designed to ensure submission of information essential to the understanding and comprehensive evaluation of the Application. Failure to adhere to the instructions as outlined in this RFA shall be cause for disqualification and rejection of the Application.

1. General Instructions

- a. Each non-profit organization, state or public university, or other government entity, can submit only one Application. The Applicant must be located in California and serves clients in California.
- b. More than one Application, from a non-profit organization, state or public university, or other government entity shall not be considered. Reasonable grounds for believing that any applicant and/or proposed subcontractor has submitted more than one Application shall cause rejection of all Applications submitted by that Applicant.
- c. All narrative portions should be straightforward, detailed, and precise. The quality of the Application, not the volume, packaging, or elaborate displays, will receive greater attention in the evaluation process.
- d. If the Applicant is **not** a non-profit organization, state or public university, or other government entity the Application will not be considered.
- e. Before submitting a response to this solicitation, Applicants should review, correct all errors and confirm compliance with RFA requirements.

2. Format Requirements

- a. CDSS requires one (1) original Application, three (3) hard copies of the Application and one electronic copy on CD. The original Application must be marked **"ORIGINAL COPY."** All documents contained in the original Application package must have original signatures. All additional Application sets may contain photocopies of the original package.

- b. The Application must be submitted in the legal entity name of the applicant. The Application must be signed by the applicant, a corporate officer, or an authorized agent of the applicant. **Signature facsimile stamps shall not be accepted.**
- c. All RFA attachments that require a signature must be signed in blue ink.
- d. Format the narrative portions of the Application using one-inch margins at top, bottom and both sides, a font size of not less than 11 points, printed single-sided on white bond paper with sequential pagination. The Application should include tabbed divider pages, separating the Application into the following sections:
 - *Introduction*
 - *Applicant Qualifications*
 - *Personnel Requirements*
 - *Fiscal Experience*
 - *Subcontracting Agencies (if applicable)*
 - *Scope of Work*
 - *Applicant Budgets*
 - *Subcontractor Budgets (if applicable)*
 - *Other Attachments*
- e. Bind Application in a three ring binder to enable easy page removal.
- f. Do not mark any portion of your Application response as “Confidential” or “Proprietary.” CDSS will disregard any such markings.

3. Content Requirements

This section specifies the **order** and **content** of each Application.

a. Introduction

- 1) Application Cover Page (**Attachment 2**)
- 2) Contractor Information Form (**Attachment 3**)
- 3) RFA Submission Checklist (**Attachment 1**)
- 4) Table of Contents

A Table of Contents must be provided. It must identify all major sections of the Application by page number. All exhibits and attachments must also be identified and referenced by page number.

b. Applicant Qualifications (Section G)

- 1) Description of Capability to Participate
- 2) Agency Background and Experience
- 3) Counties of Operation
- 4) Letters of Support

c. Personnel Requirements (Section H)

d. Fiscal Experience (Section I)

- e. **Subcontracting Agencies (if applicable) (Section J)**
 - 1) MOU Template
 - 2) Subcontracting Agency Description
 - 3) Narrative of Capability
- f. **Scope of Work (Section K)**
 - 1) SOW Attachment 8
- g. **Applicant Budgets (Section L)**
 - 1) Budget Detail and Summary FFY 2015 (**Attachments 6a & 6b**)
 - 2) Budget Detail and Summary FFY 2016 (**Attachments 6c & 6d**)
- h. **Subcontractor Budgets (if applicable) (Section L)**
 - 1) Budget Detail and Summary FFY 2015 (**Attachments 7a & 7b**)
 - 2) Budget Detail and Summary FFY 2016 (**Attachments 7c & 7d**)
- i. **Other Attachments**
 - 1) Disclosure of Lobbying Activities (**Attachment 4**)
 - 2) Payee Data Record (**Attachment 5**)
 - 3) Certification of Indirect Costs (**Attachment 9**)
 - 4) Darfur Contracting Certification (**Attachment 10**)
 - 5) Iran Contracting Act (if applicable) (**Attachment 11**)

N. APPLICATION SUBMISSION

1. **One (1) original, three (3) copies and one electronic copy on CD** of the Application must be received by CDSS, **no later than 4:00 p.m. on May 30, 2014**. Postmarks or facsimile (FAX) transmission shall not be accepted in lieu of this requirement. Late Applications received after this date and time will not be considered and will be deemed nonresponsive by CDSS.
2. The Application must be submitted under sealed cover with the Applicant's business name, return address, and the words **"SEALED BID - DO NOT OPEN, CALFRESH RFA 15-01, CALFRESH OUTREACH PLAN, Due May 30, 2014, 4:00 p.m."** indicated on the outside of the package.

If an Application is made under a fictitious name or business title, the actual legal name of applicant must be provided.

3. Applications must be submitted either by mail or by personal delivery to:

Ms. Lisa Hernandez, Branch Secretary
California Department of Social Services, CalFresh Branch
744 P Street, MS 8-9-32
Sacramento, California 95814

Applications submitted to any other office shall not be accepted.

4. **Applicant Warning for Deliveries:** CDSS' internal processing of U.S. mail may add up to 48 hours to the delivery time. If you choose hand delivery, allow sufficient time to locate parking and for visitor security procedures. Applicants will need to provide security personnel with the name and telephone number of the person to whom the package is to be delivered. Security personnel will not accept delivery. Security will only notify the appropriate staff to accept delivery.
5. Costs for developing Applications in anticipation of award are entirely the responsibilities of the applicant and shall not be charged to, or reimbursed by, CDSS.
6. All Applications shall include the documents identified in Section M.3., Content Requirements. Applications not including required content shall be deemed non-responsive. A non-responsive Application is one that does not meet the basic Application requirements.
7. The State's General Terms and Conditions (GTC) are not negotiable.

O. APPLICANT ASSURANCES

The Applicant (if awarded a contract) must certify that the following statements are true as applied to the Applicant and all Subcontractors (if any):

1. The Applicant is accountable for the content of the Scope of Work and will provide program oversight of all Subcontractors (if any).
2. The Applicant is fiscally responsible for outreach activities funded under the contract, including those of Subcontractors (if any), and is liable for repayment of unallowable costs.
3. CalFresh outreach activities conducted by Contractor or Subcontractors (if any) are targeted to those most likely eligible for benefits.
4. Cash or in-kind donations from other non-Federal sources have not been claimed or used as a match or reimbursement under any other Federal program.
5. Duplicate or additional payments for the same work (approved applications, SAR 7s and Recertifications) are not received through separate contracts with county welfare departments.
6. If in-kind goods and services are part of the budget, only public in-kind services are included. No private in-kind goods or services are claimed.
7. Documentation of Applicant and Subcontractor (if any) costs, payments, and donations for approved CFO activities are maintained by the Applicant and available for CDSS/USDA-FNS review and audit.

8. Program activities are conducted in compliance with all applicable Federal laws, rules, and regulations including Civil Rights and Office of Management and Budget regulations governing cost issues.
9. Program activities do not supplant existing CFO programs, and where operating in conjunction with existing programs, enhance and supplement them.
10. Program activities are reasonable and necessary to accomplish CFO goals and objectives.

P. APPLICANT QUESTIONS

Interested parties are advised to notify CDSS before the date and time stated for “Written Questions Submission Deadline” in Section B of this RFA entitled, “Time Schedule” if clarification is needed regarding the services sought or if questions arise about the RFA and/or its accompanying materials, instructions, or requirements. CDSS may contact an inquirer to seek clarification of any inquiry received. The written inquiry must be transmitted to CDSS as instructed below.

Applicants that fail to report a known or suspected problem with the RFA and/or its accompanying materials, or who fail to seek clarification and/or correction of the RFA and/or its accompanying materials, submit their application at their own risk. In addition, if awarded the cooperative agreement, the successful applicant shall not be entitled to additional compensation for any additional work caused by such problem, including any ambiguity, conflict, discrepancy, omission, or error.

If an inquiry appears to be unique to a single firm or is marked “Confidential”, CDSS will mail, email, or fax a response only to the inquirer if CDSS concurs with the inquirer’s claim that the inquiry is sensitive or proprietary in nature. If CDSS does not concur, the inquiry will be answered in the manner described herein and the inquirer will be so notified. Inquiries and/or responses that CDSS agrees shall be held in confidence only until the Notice of Intent to Award is posted.

To the extent practical, inquiries shall remain as submitted. However, CDSS may consolidate and/or paraphrase similar or related inquiries.

1. What to Include in an Inquiry

- a. Inquirer’s name, name of firm submitting the inquiry, mailing address, email address, area code and telephone number, and fax number.
- b. RFA section, page number or other information useful in identifying the specific problem or issue in question.
- c. A description of the subject or issue in question or discrepancy found.
- d. Remedy sought, if any.

2. How to submit questions

Applicants are encouraged to email questions to CDSS at CalFreshAccess@dss.ca.gov no later than 4:00 p.m. on May 2, 2014. All questions and responses will be posted on

the CalFresh Outreach website at <http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm> and open to all to view.

CDSS will only accept questions about RFA errors or irregularities if such questions are received prior to the Application submission deadline. Only written questions will be allowed. Verbal inquiries will not be allowed. The questions and answers will be posted on our CalFresh Outreach website and can be found at:

<http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm> after the **voluntary** Pre-Application Teleconference.

3. Addenda

If any clarifications or modifications to this RFA are necessary, all questions and answers, addenda or changes will be posted on the CalFresh Outreach website at <http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm>. It is the responsibility of the potential applicants to check the website frequently to keep updated regarding this RFA.

4. Voluntary Pre-Application Teleconference

CDSS will conduct a **voluntary** Pre-Application Teleconference on the date and time stated for “Voluntary Pre-Application Teleconference” in Section B of this RFA entitled, “Time Schedule”. Prospective applicants that intend to submit an application are encouraged to participate in the **voluntary** Pre-Application Teleconference.

To participate in the teleconference, use a touch-tone telephone to dial (888) 398-2342, and then enter the following access code 3366340#. The voluntary Pre-Application Teleconference is a public event or meeting and anyone can join.

Teleconference participants will be asked to identify the potential contractor they are representing so that a sign-in sheet can be generated for the teleconference.

It shall be each prospective applicant’s responsibility to join the teleconference promptly at the time stated in Section B of this RFA entitled, “Time Schedule.” CDSS reserves the right not to repeat information for participants that join the teleconference after it has begun.

If a potential prime contractor is unable to attend the voluntary Pre-Application Teleconference, an authorized representative of its choice may attend on its behalf. The representative may only sign in for one potential contractor. Subcontractors may represent a potential prime contractor at the voluntary Pre-Application Teleconference.

5. Teleconference Purpose

- a. Allow prospective applicants to ask questions about the services sought or RFA requirements and/or instructions.
- b. Share the answers to general questions and inquiries received before and during the teleconference.

Spontaneous verbal remarks provided in response to questions/inquiries are unofficial and are not binding on CDSS unless later confirmed in writing.

Carefully review this RFA before the teleconference date to become familiar with the qualification requirements, Scope of Work and application content requirements. Teleconference attendees are encouraged to have their copy of this RFA available for viewing during the teleconference.

If CDSS is unable to respond to all inquiries received before and/or during the teleconference, CDSS will provide written answers shortly thereafter. CDSS reserves the right to determine which inquiries will be answered during the teleconference and which will be answered later in writing.

Teleconference attendees are responsible for their costs to attend/participate in the teleconference. Those costs cannot be charged to CDSS or included in any cost element of an applicant's price offering.

For contractors who need assistance, due to a physical impairment, reasonable accommodation will be provided by CDSS upon request for the Voluntary Pre-Application Teleconference. The Applicant must email calfreshaccess@dss.ca.gov no later than the fifth working day prior to the scheduled date and time of the Voluntary Pre-Application Teleconference conference to arrange for a reasonable accommodation.

NOTE: The range of assistive services available may be limited if requestors cannot allow ten (10) or more business days prior to the date the alternate format material is needed.

Q. EVALUATION AND SELECTION

A multiple stage evaluation process will be used. CDSS will reject any Application that is found to be nonresponsive at any stage of evaluation.

1. Stage 1 – RFA Checklist Review

After the Application submission deadline, CDSS staff will review each Application to ensure it includes all items of the RFA checklist. **Applications that do not include all items of the RFA checklist (Attachment 1) may not be considered for funding and may be deemed non-responsive.**

2. Stage 2 – Application Review

- a. Applications that pass the Stage 1 review will be submitted to an evaluation committee. The evaluation committee will evaluate the Application based on its adequacy, accuracy, thoroughness and the degree to which it complies with the RFA requirements.

3. Applicant Qualifications

Applicant Qualifications Rating Factors (Refer to Section G)	
a)	To what extent did the narrative clearly demonstrate that the applicant's goals are relevant, closely related or complementary to the SOW of CFO?
b)	To what extent did the narrative demonstrate that the applicant possesses sufficient experience in working with low-income clients in community-based settings?
c)	To what extent did the narrative demonstrate that the applicant possesses sufficient experience in establishing and maintaining effective working relationships with government entities, local community-based organizations and private nonprofit organizations?
d)	To what extent did the narrative demonstrate that the applicant possesses sufficient experience working with targeted population groups, including working low-income households, Latinos, seniors, mixed status households, immigrants, veterans and military families?
e)	To what extent did the narrative demonstrate that the applicant possesses sufficient experience to educate people potentially eligible for the program about CalFresh and address barriers to program participation?
f)	To what extent did the narrative demonstrate that the applicant has performed services that were similar in nature or closely related to CalFresh in the past three (3) years?
g)	To what extent did the narrative demonstrate that the applicant's previous partners were satisfied with their services or deliverables in the past five (5) years?
h)	To what extent did the narrative demonstrate that the applicant is able to provide services to the county(ies) in which they plan to conduct CFO activities?
i)	To what extent did the narrative demonstrate that the applicant's key personnel have the qualifications and experience necessary to perform the services in the SOW for CFO?
j)	To what extent did the narrative demonstrate that the applicant possesses sufficient experience in managing subcontractors, including partnering agencies and organizations that serve low-income communities?
k)	To what extent did the narrative demonstrate that the applicant possesses sufficient fiscal experience in managing accounting, invoicing and general fiscal management practices to be in compliance with CDSS requirements?

4. Scope of Work

SOW Rating Factors (Refer to Section K)	
a)	To what extent did the narrative demonstrate that the applicant possesses sufficient experience to submit completed CalFresh Applications on behalf of the client?
b)	To what extent did the narrative demonstrate that the applicant possesses sufficient working relationship with the county(ies) that the applicant will be operating in to track outcomes of submitted applications?
c)	To what extent did the narrative demonstrate that the applicant possesses sufficient experience to submit completed SAR 7 forms on behalf of the client?

SOW Rating Factors (Refer to Section K)
d) To what extent did the narrative demonstrate that the applicant possesses sufficient experience to submit completed CalFresh Recertification Applications on behalf of the client?
e) To what extent did the narrative demonstrate that the applicant possesses sufficient experience to partner with counties and CBOs, serve targeted populations, address barriers to participation and meet the overall goals of the CFO Plan?

5. Budget Detail and Summary

Budget Detail and Summary Rating Factors (Refer to Section L)
a) To what extent did the applicant demonstrate that the budget is in alignment with their SOW Attachment 8 and that it corresponds to the maximum guidelines for the combined budget ?
b) To what extent did the applicant demonstrate the numbers of FTE are appropriate to achieve the SOW of CFO?
c) To what extent did the applicant demonstrate how the staff annual salary is appropriate in relation to the assigned duties and level of responsibility?
d) To what extent did the applicant demonstrate that the expenses in the budget detail are appropriate to achieve the SOW of CFO?

6. Subcontractor Qualifications (If Applicable)

Subcontractor Qualifications Rating Factors (Refer to Section J)
a) To what extent did the narrative provide a brief description of each subcontractor?
b) To what extent did the narrative demonstrate the subcontractors' capability to participate successfully in the CFO Plan?
c) To what extent did the narrative demonstrate the qualifications and duties or roles of each subcontractor?
d) To what extent did the narrative demonstrate that each subcontractor is necessary and their contribution of services and expertise will add to the CFO Plan?

7. Subcontractor Budget Detail and Summary (If Applicable)

Subcontractors Budget Detail and Summary Rating Factors (Refer to Section L)
a) To what extent did the applicant demonstrate that the subcontractors' budget is in conjunction with their SOW and it corresponds to the maximum guidelines for the combined budget ?
b) To what extent did the applicant demonstrate the subcontractors' numbers of FTE are appropriate to achieve the SOW of CFO?
c) To what extent did the applicant demonstrate how the subcontractors' staff annual salary is appropriate in relation to the assigned duties and level of responsibility?
d) To what extent did the applicant demonstrate that the subcontractors' expenses in the budget detail are appropriate to achieve the SOW of CFO?

R. GENERAL RFA INFORMATION

1. Nonresponsive Applications

In addition to any condition previously indicated in this RFA, the following occurrences will cause CDSS to deem an Application nonresponsive.

- a. Failure of an applicant to meet Application format/content or submission requirements.
- b. Applicant submits an Application that is conditional, materially incomplete, or contains material defects, alterations, or irregularities of any kind.
- c. If an applicant supplies false, inaccurate, or misleading information or falsely certifies compliance on any RFA attachment.

2. Application Modifications after Submission

An Applicant may modify an Application after its submission by withdrawing its original Application and resubmitting a new Application prior to the Application submission deadline. Application modifications offered in any other manner, oral or written, will not be considered.

3. Withdrawal and/or Resubmission of Application

An applicant may withdraw an Application at any time before the Application submission deadline. An Applicant may withdraw its Application by submitting a written withdrawal request to the CDSS, signed by the applicant or an authorized representative of the applicant. An Applicant may thereafter submit a new Application prior to the Application submission deadline. Applications may not be withdrawn without cause subsequent to Application submission deadline.

4. Contract Award and Protests

Contract Award

- 1) CDSS shall post a “Notice of Intent to Award” on the CalFresh Outreach website at <http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm> for five (5) working days prior to awarding the contract.
- 2) A copy of the Notice of Intent to Award will be mailed or faxed to all firms that submitted an Application.

5. Appeal Process and Requirements

Applicants selected for funding are selected on a “contingency basis,” pending resolution of any appeals of the selection process used for this RFA. CDSS has the discretion to reject all applications.

The ability to contract shall be awarded after a notice of the proposed award(s) has been posted on the CalFresh Outreach website at <http://www.cdss.ca.gov/calfreshoutreach/PG3510.htm> for five (5) working days. If, prior to the award deadline, an applicant files a letter of appeal against the awarding of a specific contract, the contract shall not be awarded until the appeal has been resolved. Only non-funded applicants that submitted a timely application complying with the RFA instructions may file an appeal.

A letter of appeal will be accepted via email only. The deadline to submit a letter of appeal to CDSS is June 13, 2014 at 4:00 PM PST. It is the applicant's responsibility to ensure receipt by this date and time. Oral, mailed, and late appeals will not be accepted. All letters of appeal shall be emailed to:

Mr. Sysvanh Kabkeo, Section Chief
California Department of Social Services, CalFresh Branch
CalFreshAccess@DSS.ca.gov

The letter of appeal filed by a protesting applicant must set forth the issues in dispute, the basis for the appeal, the legal authority supporting the appeal, and the remedy sought. Applicants may not use the appeal process to add new information to the grant application. Appeals shall be limited to the following grounds:

1. The contract(s) was not awarded to the applicant(s) whose proposal was given the highest score(s) by the evaluation committee; and/or
2. The applications were not evaluated according to the scoring and selection procedures described in the RFA. Disagreements with an evaluator's comments or scores are not sufficient grounds for an appeal.

Upon receipt of the emailed letter of appeal, the State will examine the matter and issue a written decision to the applicant within 20 calendar days. This decision of the State shall be final. The written decision of the State shall contain the following information:

1. A description of the dispute;
2. A statement of the factual areas of agreement or disagreement; and
3. A statement of the State's decision with supporting rationale.

6. Disposition of Applications

- a. Upon Application opening, all documents submitted in response to this RFA shall become the property of the State of California and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.), and subject to review by the public. The State may not prevent disclosure of public documents. However, the contents of all Applications, draft Applications, correspondence, agenda, memoranda, working papers, or other medium that discloses any aspect and/or personal identifiers of applicant's Application, shall be held in the strictest confidence until the "Notice of Intent to Award" is posted.

- b. Notwithstanding information considered by CDSS as confidential or personal identifiers, submission of an Application by an applicant shall constitute agreement to public disclosure of the Application after the “Notice of Intent to Award” is posted.
- c. Application packages may be returned only at the applicant’s expense, unless such expense is waived by the CDSS.

7. CDSS Rights

In addition to the rights discussed elsewhere in this RFA, CDSS reserves the following rights.

a. Interpretations and Addenda

CDSS reserves the right to amend, alter, or change any rules or conditions contained in this RFA prior to the deadline for submission of Applications. Any revisions to RFA will be through addenda or supplements to RFA and shall become a part of the RFA. The State will **not** be responsible for any other explanation or interpretation. All addenda shall be sent to all persons and entities that received a copy of this RFA directly from the CDSS.

b. Immaterial Application Defects

CDSS may waive any immaterial defect in any Application and allow the applicant to remedy those defects. CDSS’ waiver of an immaterial defect in an Application shall in no way modify the RFA document or excuse an applicant from full compliance with all requirements if awarded the resultant contract.

c. Correction of Clerical or Mathematical Errors

- 1) CDSS reserves the right, at its sole discretion, to overlook, correct or require an applicant to remedy any obvious clerical or mathematical errors.
- 2) If the correction of an error results in an increase or decrease in the total cost, CDSS may give the applicant the option to accept the corrected cost or withdraw their Application.
- 3) Applicants may be required to initial corrections to costs and dollar figures if the correction results in an alteration of the annual costs or total cost offered.
- 4) If a mathematical error occurs in a total or extended price and a unit price is present, CDSS will use the unit price to settle the discrepancy.

d. Cancellation of Tentative Award or RFA

The issuance of this RFA does not constitute a commitment by CDSS to award a contract. CDSS reserves the right to reject all Applications and to cancel this RFA if in the best interests of CDSS. The agency is not required to award an agreement.

e. CDSS Use of Ideas and Concepts

CDSS reserves the right to use any and all ideas or concepts in any Application submitted and/or selected for the award of the contract.

f. Verification of Applications

CDSS reserves the right to contact all references provided and use independent means to verify and validate documentation or statements submitted by the applicant.

8. News Releases

News releases pertaining to this RFA and its award will not be made without prior approval of the CDSS.

S. SMALL BUSINESS AND NON-SMALL ENTERPRISE PREFERENCE PROGRAM

Section 14835, et seq. of the California Government Code (GC) requires that a five percent (5%) preference be given to bidders who qualify as a small business. Moreover, GC Section 14838(b)(1)(2) provides for a non-small business preference. The preference to a non-small business applicant that commits to certified small business or microbusiness subcontractor participation of 25 percent of its net bid price shall be five percent (5%). The rules and regulations of this law, including the definition of small business for the delivery of services, are contained in Title 2, California Administrative Code, and Section 1896, et seq. To claim the small business/non-small business preference, which may not exceed \$50,000.00 for any bid, your firm must have its principal place of business located in California and be certified by the Department of General Services (DGS), Office of Small Business and DVBE Certification (OSDC). Should you have questions about small business certification, contact the OSDC at (916) 375-4400, or visit their Internet site: <http://www.pd.dgs.ca.gov/smbus>. The Goal for Small Business and Non-small Enterprise Preference Program shall not apply to this RFA.

T. DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PARTICIPATION PROGRAM REQUIREMENTS

Subject to exceptions in the Government Code and pursuant to regulations, State law requires awarding agencies to have an annual participation goal of three percent (3%) for disabled veteran-owned business enterprises. The goal for DVBE participation **shall not apply** to this RFA.

For more information about the DVBE program, contact the OSDC at (916) 375-4400, or visit their Internet site at: <http://www.pd.dgs.ca.gov/smbus>

U. DARFUR CONTRACTING ACT

All bidders must address the requirements of the Darfur Contracting Act of 2008, Attachment 10, for the reason described in Public Contract Code section 10475. Any scrutinized companies are ineligible to, and cannot, bid on or submit an Application for contract with a State agency for goods or services. A scrutinized company is defined in Public Contract Code section 10476. However, bids may be submitted by scrutinized companies if permission is obtained first from the Department of General Services according to the criteria set forth in Public Contract Code section 10477(b).

V. TAX DELINQUENCIES CONTRACT BAN

Public Contract Code section 10295.4 provides that a state agency shall not enter into any contract for goods or services with a contractor whose name appears on either list of the 500 largest tax delinquencies pursuant to Section 7063 or 19195 of the Revenue and Taxation Code. This section applies to contracts executed on or after July 1, 2012. The Franchise Tax Board (FTB) and Board of Equalization (BOE) will post and periodically update lists of the 500 largest tax delinquencies on their websites as required by law. Starting July 1, 2012, prior to executing the contracts, state agencies must check the FTB and BOE lists to ensure the proposed awardee/vendor is not on either list.

W. IRAN CONTRACTING ACT

All vendors bidding on or submitting an Application to the State of California for goods or services of \$1,000,000 or more, must address the requirements of the Iran Contracting Act, Attachment 11, for the reason described in the Public Contract Codes section 2202 - 2208. Prior to bidding on, submitting an Application or executing a contract or renewal for State of California contract for goods or services of \$1,000,000 or more, must either: a) certify it is **not** on the current list of persons engaged in investment activities in Iran created by the California Department of General Services ("DGS") pursuant to Public Contract Code section 2203(b) and is not a financial institution extending twenty million dollars (\$20,000,000) or more in credit to another person, for 45 days or more, if that other person will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS; or b) demonstrate it has been exempted from the certification requirement for that solicitation or contract pursuant to Public Contract Code section 2203(c) or (d).

X. LOSS LEADER

It is unlawful for any person engaged in business within this state to sell or use any article or product as a "loss leader" as defined in Section 17030 of the Business and Professions Code.

Y. CONTRACT TERMS AND CONDITIONS

1. All contracts entered into with the CDSS will include General Terms and Conditions (GTC) and Contractor Certification Clauses (CCC) that may be viewed and downloaded at Internet site at: <http://www.dgs.ca.gov/ols/home.aspx>. The most recent versions of

the documents are GTC 610 (**Exhibit C**) and CCC 307 (**Exhibit G**). CDSS will use the most current versions of the documents in the resulting Agreement.

2. A sample contract is provided as **Exhibit A-G**. The sample contract contains additional provisions that may appear in the resulting Agreement (e.g., Confidentiality and Security Requirements, etc.). Other contract terms, not specified herein, may also appear in the resulting Agreement.
3. If full funding does not become available, is reduced or CDSS determines that it does not need all of the services described in this RFA, CDSS reserves the right to offer an amended Agreement for reduced services.
4. CDSS reserves the right to change or delete the tasks to be performed by Contractor. The Contractor may request modifications to work to be performed, including service goals or performance standards, which shall be done through an amendment. The request shall be in writing and contain a clear justification as to the need for the modification. CDSS has sole authority to determine whether or not the written justification substantiates the request for modification. Modifications shall be mutually agreeable to both parties.
5. Failure by the Contractor to comply with any of the provisions, requirements, or conditions of this RFA and/or resultant contract, including, but not limited to, reporting or corrective action plan requirements, may be a violation of proposed Agreement. In such an event, CDSS may, in its sole discretion, notify the Contractor by certified mail of such noncompliance, nonperformance, or other breach, require remedial action and provide a date by which such remedial action must be accomplished, and/or discontinue reimbursement to the contractor of an amount to be determined by the CDSS for and during the period in which the Contractor is in violation.

In the event the violation is **not** remediated to the satisfaction of CDSS, the Agreement may be terminated and reimbursement may not be made for the period of noncompliance. The proposed contractor may be notified by certified mail of the immediate termination of the Agreement. CDSS shall assume no fiscal liability after the termination date referenced in the certified letter.

Z. DEFINITIONS

Applications Approved: CalFresh applications submitted by your agency and/or subcontractors on behalf of a client and subsequently approved by the County Welfare Department (CWD) for benefits

Applications Submitted: CalFresh applications (both paper and on-line) submitted by your agency and/or subcontractors on behalf of a CalFresh eligible client via activities funded by the CFO plan.

CalFresh Eligible: Persons that meet criteria for participation in CalFresh as described in CDSS CalFresh regulations (see <http://www.dss.cahwnet.gov/lettersnotices/default.htm>).

CalFresh Outreach (CFO) Plan: An official written CDSS document that is approved by USDA-FNS and describes program access activities to be delivered.

Federal Fiscal Year: The Federal Fiscal Year runs from October 1st of through September 30th of the each year.

Federal Share: Federal funding received from the USDA to reimburse a portion of a contractor's costs for CFO activities. Federal Share funds and State Share funds together represent total contractor costs for CFO efforts. Federal Share costs represent the reimbursable portion of CFO plan costs.

Lobbying: Any activity or material, used by an organization or individual, to influence Federal, State or local officials to draft, support or sign legislation or to influence the outcomes of an election, referendum or initiative.

Prime Contractor: The organization or person that CDSS enters into a contract to conduct CFO activities.

State Share: The Contractor's qualifying CalFresh outreach contribution, derived from non-Federal funds. The Contractor's State Share contribution cannot be used as match or reimbursement under any other Federal program. State Share contributions are funded by the applicant agency during the contract term.

Subcontractor: The organization or person that a Prime Contract agency contracts with to conduct outreach activities.

USDA-FNS: The United States Department of Agriculture, Food and Nutrition Service.

AA. ATTACHMENTS AND EXHIBITS

- Attachment 1: RFA Submission Checklist
- Attachment 2: Application Cover Page
- Attachment 3: Contractor Information Form
- Attachment 4: Disclosure of Lobbying Activities
- Attachment 5: Payee Data Record
- Attachment 6a: Applicant Combined Budget Summary (FFY 2015)
- Attachment 6b: Applicant Combined Annual Budget Detail (FFY 2015)
- Attachment 6c: Applicant Combined Budget Summary (FFY 2016)
- Attachment 6d: Applicant Combined Annual Budget Detail (FFY 2016)
- Attachment 7a: Subcontractor Budget Summary (FFY 2015)
- Attachment 7b: Subcontractor Annual Budget Detail (FFY 2015)
- Attachment 7c: Subcontractor Budget Summary (FFY 2016)
- Attachment 7d: Subcontractor Annual Budget Detail (FFY 2016)
- Attachment 8: Scope of Work (FFY 2015 and FFY 2016)
- Attachment 9: Certification of Indirect Costs
- Attachment 10: Darfur Contracting Certification
- Attachment 11: Iran Contracting Act
- Exhibit A-G: Sample Contract
- Exhibit H: MOU Template